



PARTNER COLLABORATION TOOL (PCT) – QUICK GUIDE

Card Reload – Card Refund

After registering for the first time,
always use this link to log in:

[PCT.CORNER.CH](https://pct.corner.ch)

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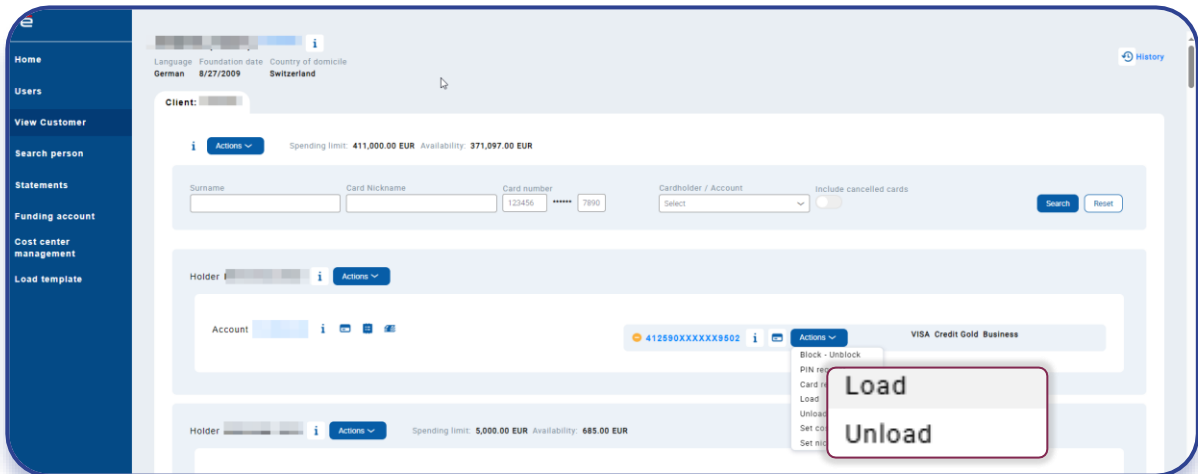
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RELOAD CARDS

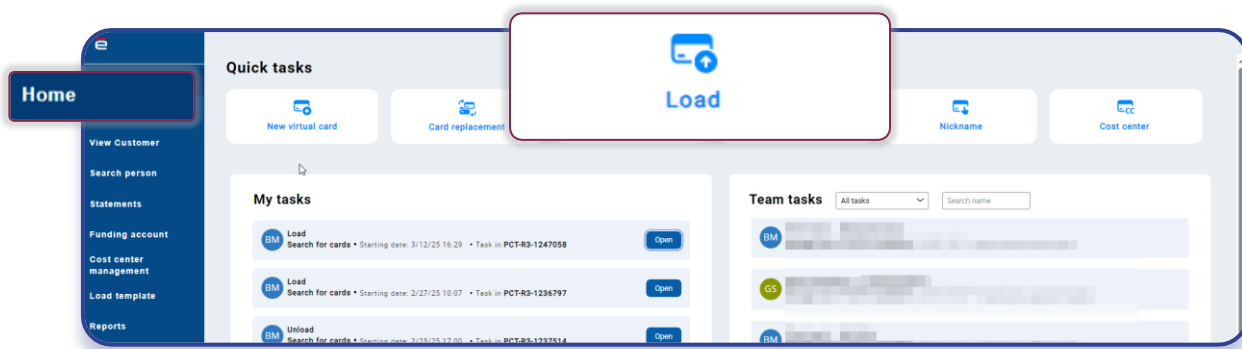
RELOAD CARDS

To reload a card, you can immediately start the activity by selecting the card (click on «Person search» or select the «View Customer»). Then, click on the blue «Actions» button and then «Load» or «Unload».

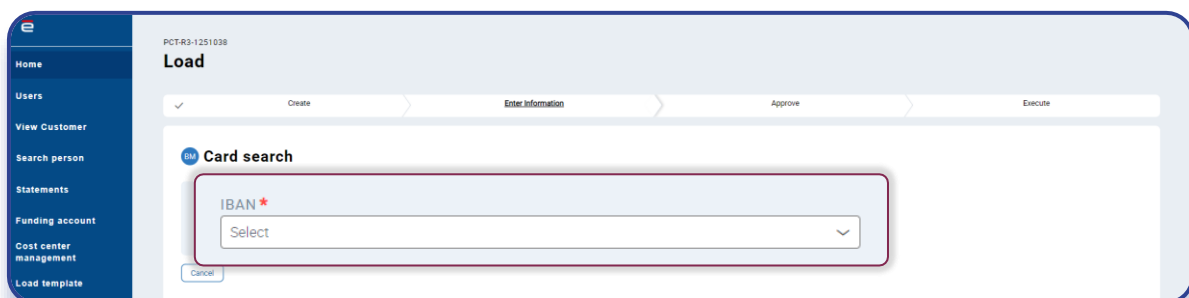


QUICK ACTIONS: BULK RELOAD

From the Home page, select the «Load» quick action button and then choose the bank account from which you wish to withdraw funds.

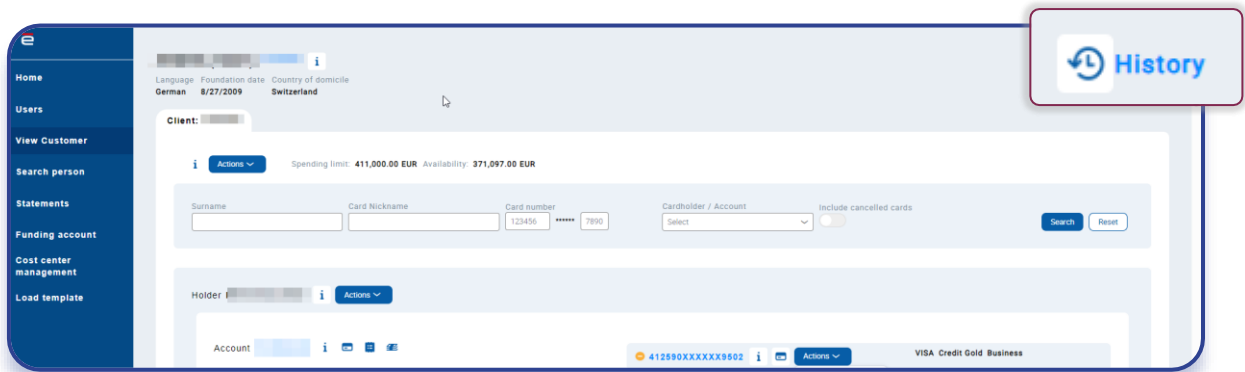


Then, select one or more cards to be reloaded. The card list displayed will only include cards of the same currency as the bank account that you have selected.

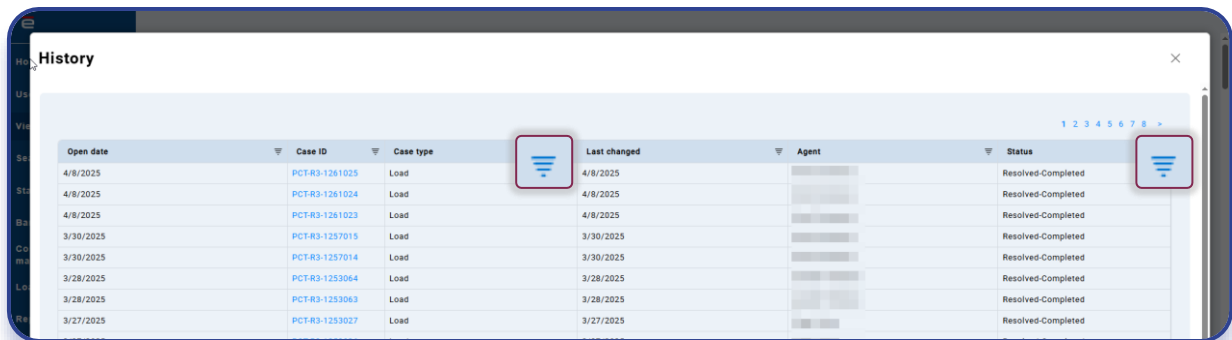


RECEIPTS

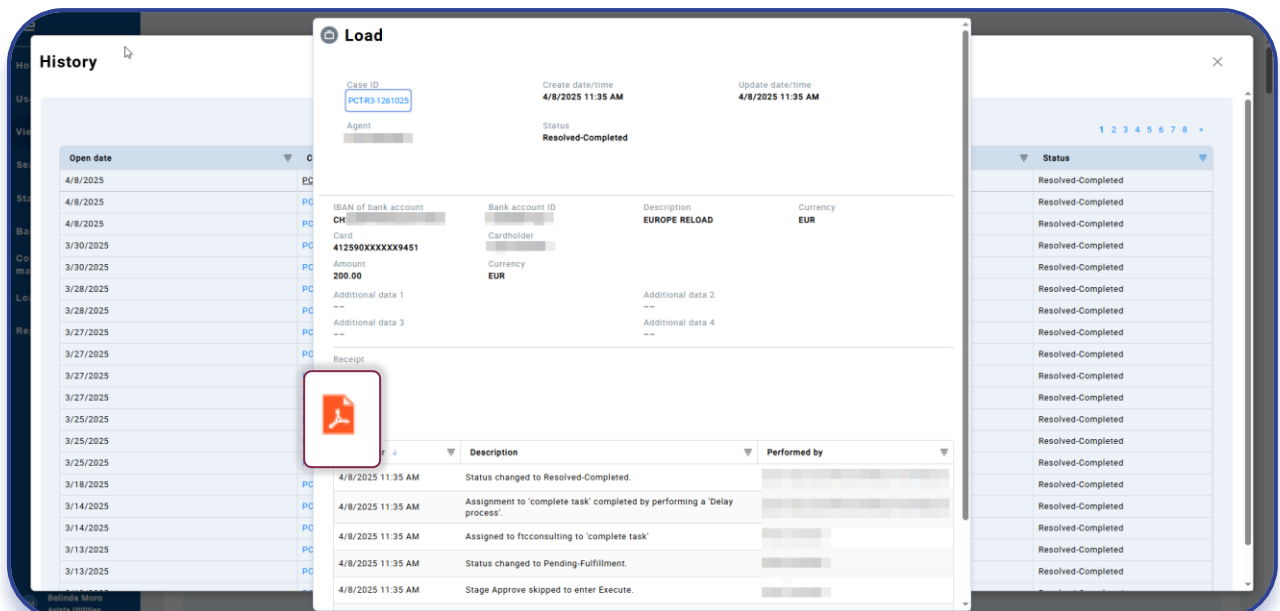
Receipts for completed card reloads can be found in the "History" section of the View Customer, in the top right corner (accessible from the dedicated menu section, if available) or via Person Search.



Use the filters in the Case Type column (select "Load") and set Status to "Resolved - Completed".

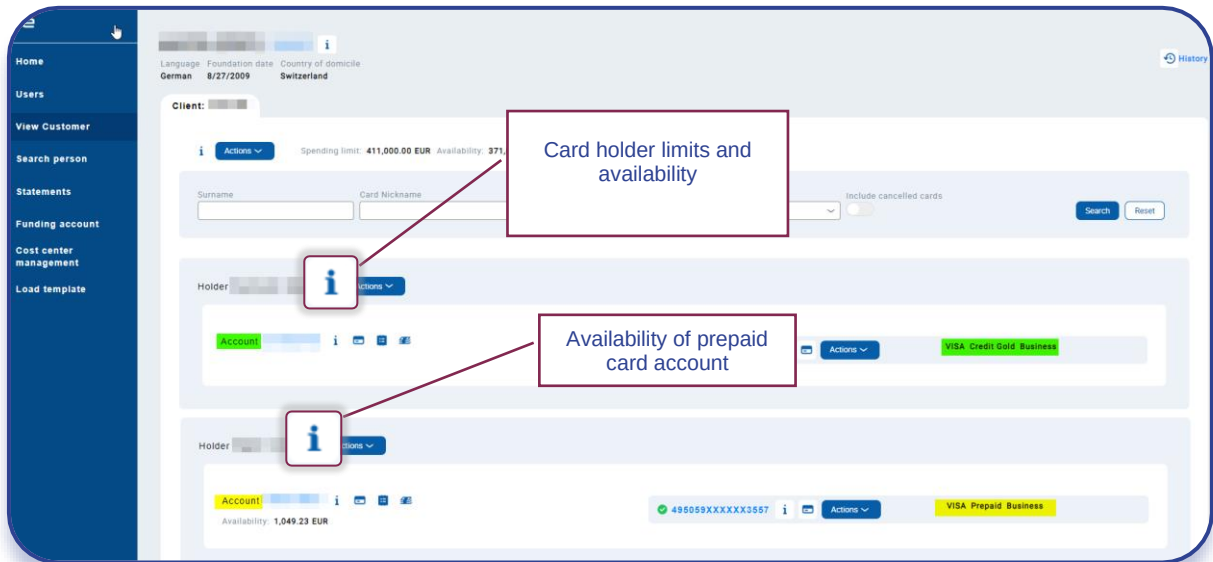


Click on the Case ID to download the PDF.



CHECK AVAILABILITY

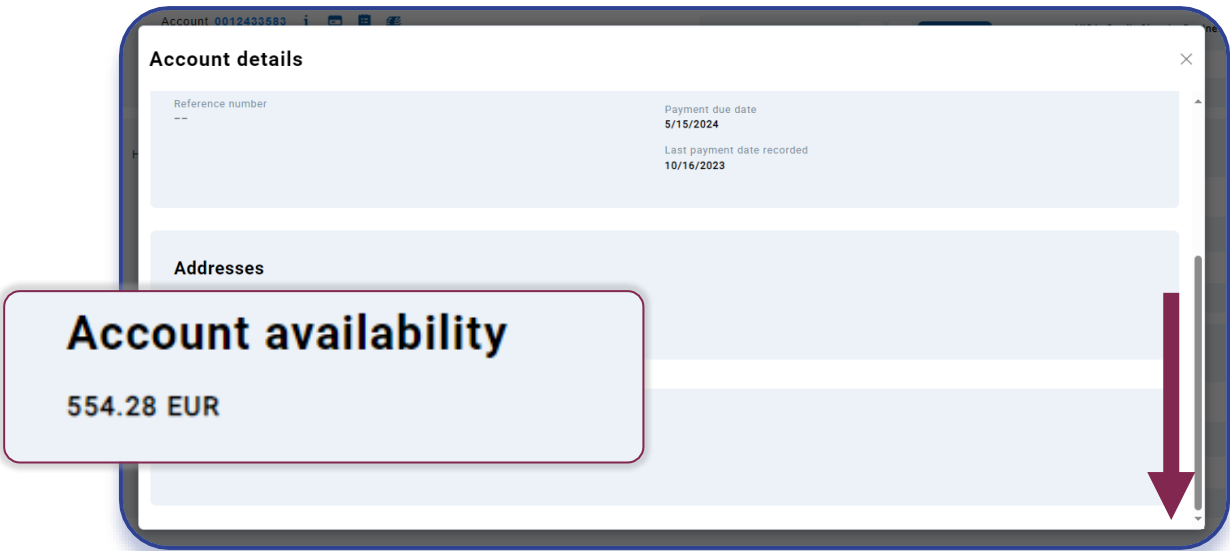
To view the availability at credit cardholder level or the availability of a prepaid card billing unit, click on the following icon in the « Search Person » or «View Customer» section:



The availability of a credit card can be found in the following table:

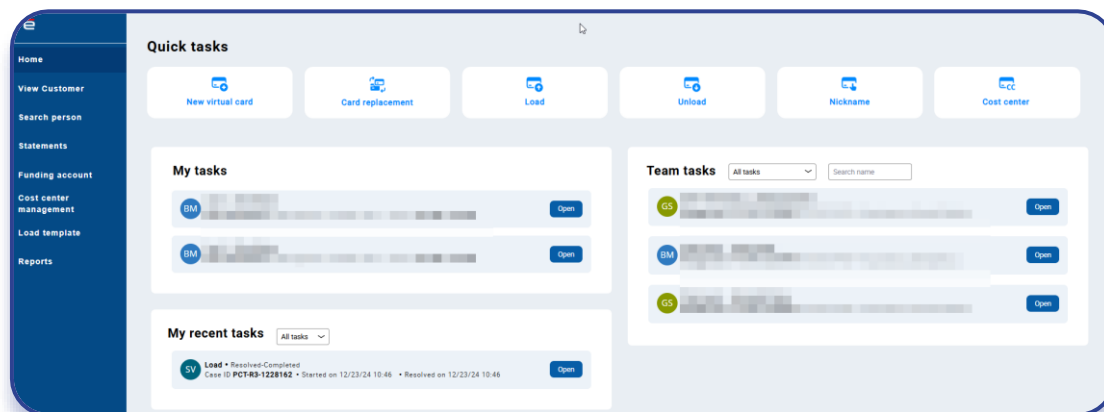
Spending limit						Remaining availability	Pending transactions	Posted amount
Limit type	Validity	Spending limit	Currency	Start validity date	End validity date			
RESTRICTED	DEFINITIVE	5,000.00	EUR	14.02.2014	--	5,610.00	-610.00	0.00

The availability of a prepaid card can be found at the bottom of the window:



WORK LIST

On the Home page, the user can find several sections which show the list of activities that have been started on the portal.



MY TASKS

This is a list of activities that the user has started but not finished.

The list indicates the type of activity and the start date. To resume the task at any time, click on the «Open» button.

To conclude the task, you need to complete the process that has already been started. Once the task has been completed, it will no longer be visible in the «My tasks» list.

If you wish to cancel the task, simply reopen it, click on «Cancel» in the bottom left-hand corner, and then confirm by pressing «Delete».

You are closing a case (PCT-R3-1191028) that has not been submitted.

You can delete it, continue working, or save your work.

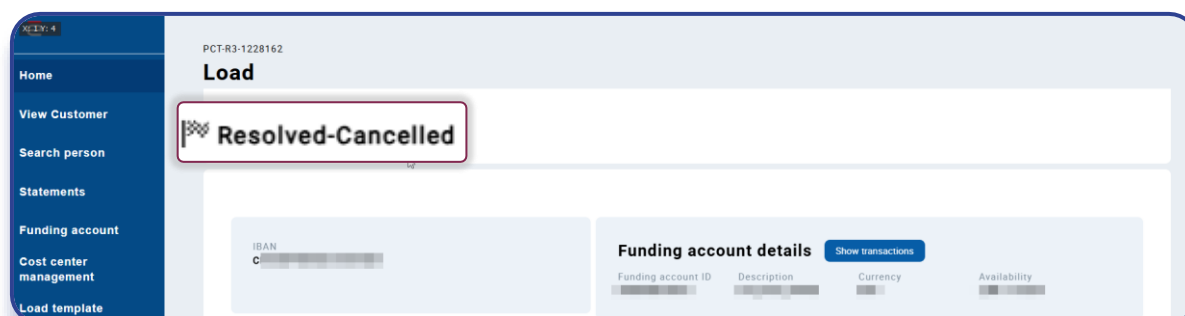
Save and close

Continue working

Delete

MY RECENT TASKS

This is the list of completed processes (which may have been completed successfully or in error). The status of the completed task is indicated in the case details above.



Resolved – completed: the process was successfully completed.

Resolved – error: the process ended in error and the request failed.

Resolved – deleted: the process was cancelled/deleted as described in the previous paragraph.

TEAM TASKS

This list shows portal users' requests that require additional approval by a user in a «Supervisor» role (four-eyes principle).

If the «four-eyes principle» review method has not been set for any function, this list will be empty. If a request needs to be authorised by a Supervisor, this will be listed. Only a Supervisor user will be able to view the «Open» button in order to open the request and to either approve or reject it.

Please note that the Supervisor role (approving requests using the four-eyes principle) can only be assigned to a user by an admin user.

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Visit the page

CORNERCARD.CH/E/PCT-GUIDE

to consult the portal user manual.